6/6/12 Version 1

SharePoint On-Boarding Tool

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Hiring Department SharePoint On-Boarding Tool Quick Start Guide

SharePoint On-Boarding Overview

Welcome to the SharePoint On-Boarding Tool: https://sp2010.ucop.edu/sites/apps/onboarding/Default.aspx

New Employee

Purpose:

The purpose of the On-Boarding SharePoint Tool is to provide a single repository accessible to On-Boarding stakeholders for tracking the On-Boarding of new employees, and promotions and transfers of current employees, so that employees are better positioned to start their new UCOP work experience.

SharePoint Landing Page Contains:

- A link to your Dashboard
- A link to the Script

What You will Use:

- **Your Dashboard** to view open requests and their status

SharePoint On-Boarding Tool Roles and Responsibilities

Human Resources Role:

The HRA will input position information into the SharePoint Tool upon approval of a new employee request. The HRA will also fill out additional information as it becomes known such as Employee Legal Name, etc. HRA will send a link to the Hiring Manager who can view and track the On-Boarding progress of their new employee.

The HRBP and HR Staff have access to view a full dashboard tracking progress of each Service Providers' task and dates under All Active Requests which is sorted by Department and can be viewed through All or Active by HRBP or HRG.

Service Provider Role:

Each Service Provider will fill out their portion of the SharePoint On-Boarding Tool, including dates and comments per the script. The same items currently tracked and completed on the On-Boarding spreadsheet will be completed in SharePoint.

Hiring Department Role:

The Hiring Department has access to view a full dashboard tracking the progress of each Service Providers' tasks and dates of completion for the new hire.

Your Dashboard will contain:

- Details for Active Positions including Request Number and key dates.
- You can click on the Request Number to view the On-Boarding Details.

The Script Contains:

- A step by step process to complete the On-Boarding Form.

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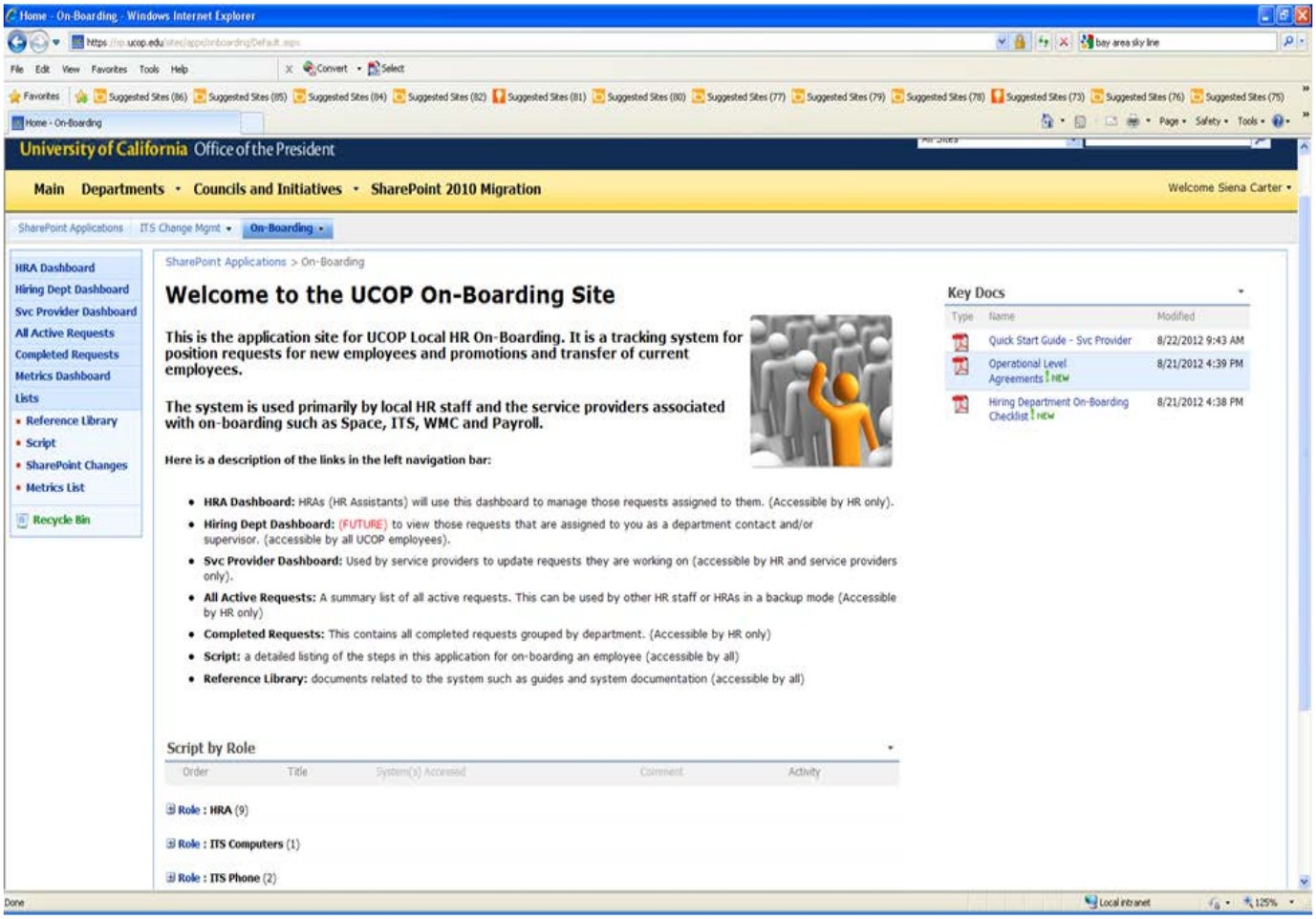
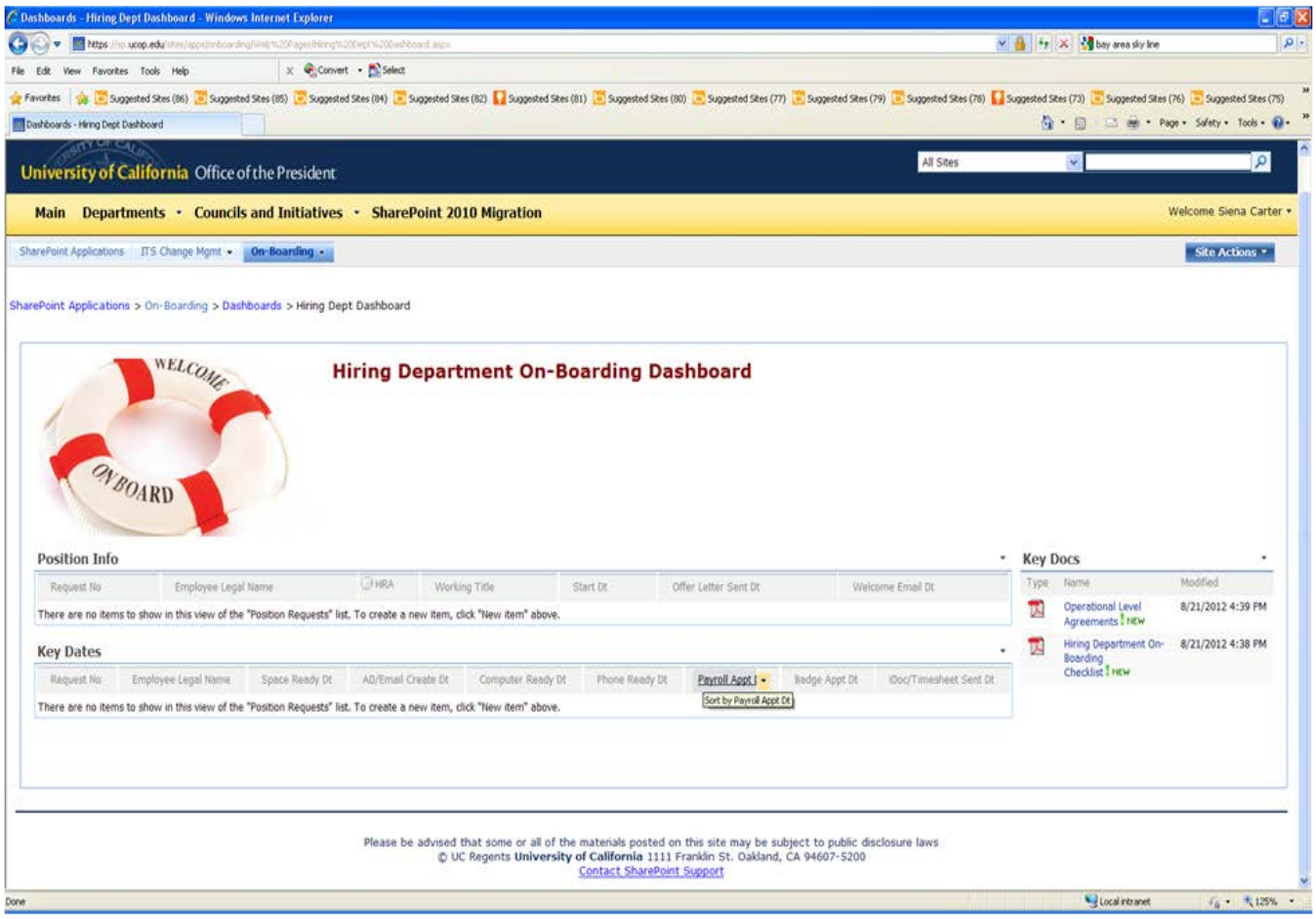
SharePoint On-Boarding Landing Page



Welcome to the SharePoint On-Boarding Tool: https://sp.ucop.edu/sites/apps/

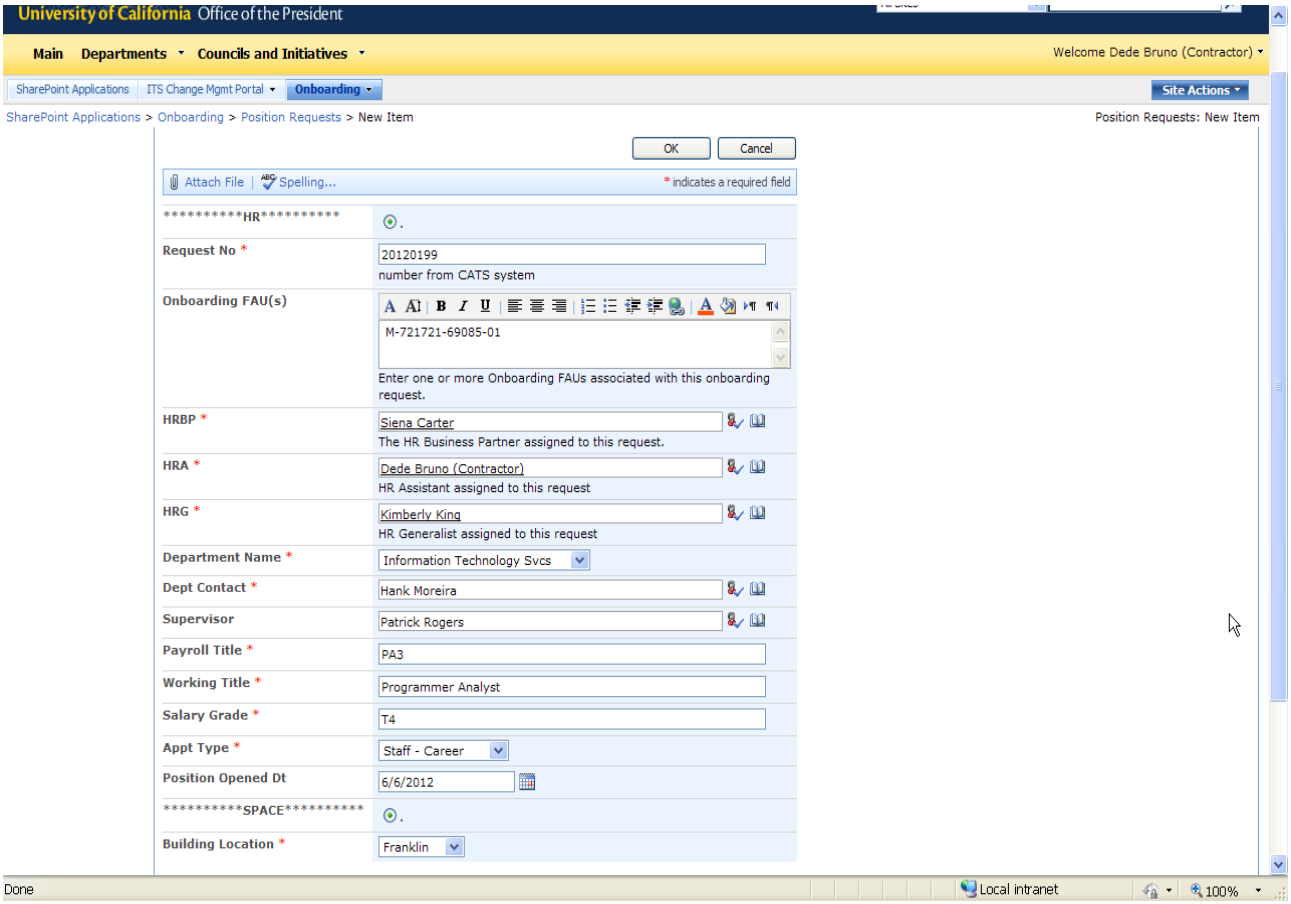
SharePoint On-Boarding Dashboard Sample



SharePoint On-Boarding Dashboard High Level Overview

- Dashboards displays differently based on Role.
- Hiring Dept Dashboard will include the position information and key task completion dates.
- You can click on the Request No. to view further Details of the request.
- When the On-Boarding Request Details are updated provided by a Service Provider, it will display on the Dashboard.
- Once all On-Boarding tasks have been completed, the HRA will close out the request and it will be moved to the "Completed Requests" Dashboard (not viewable by Hiring Department).

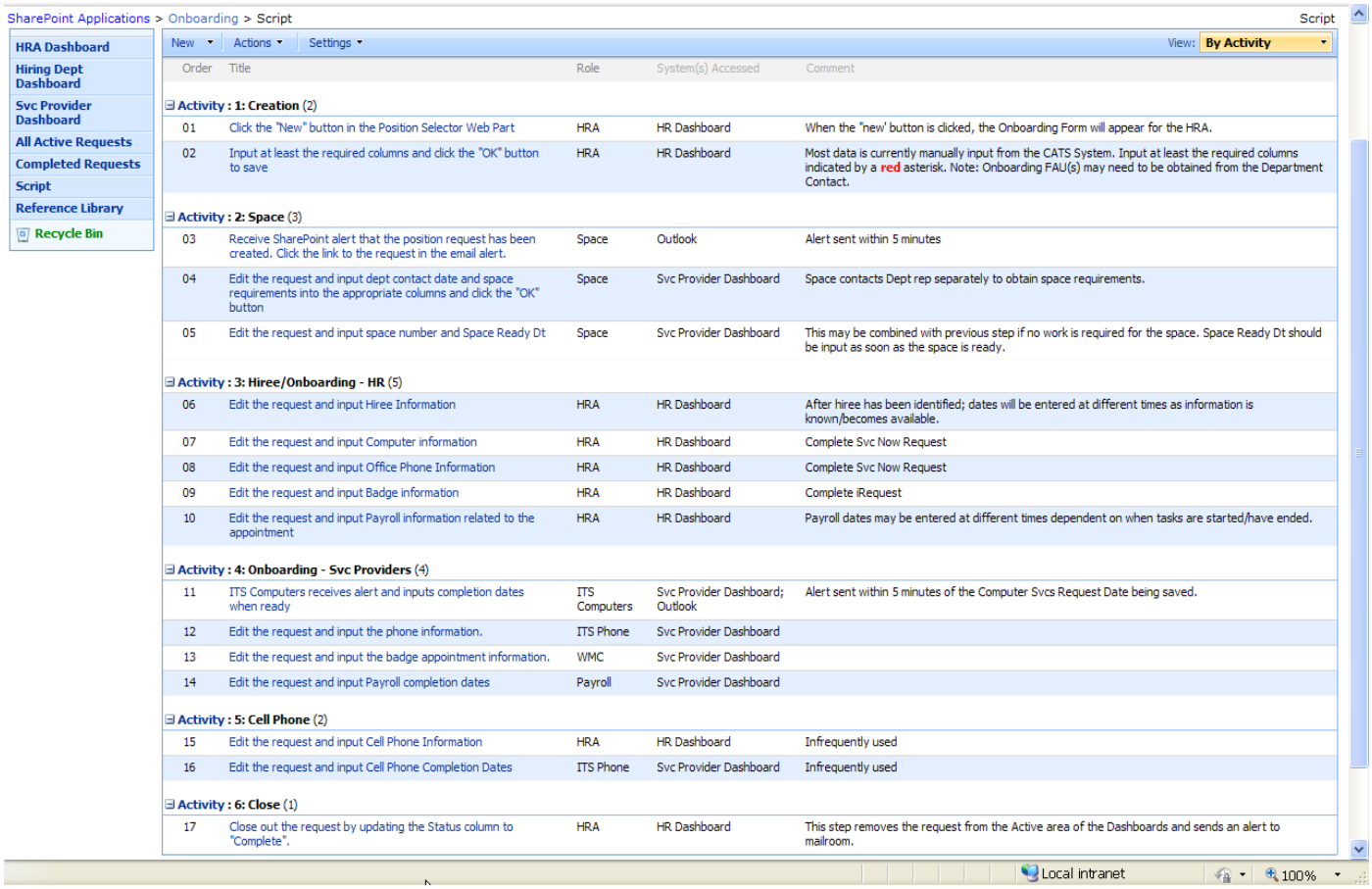
SharePoint On-Boarding Request Sample



SharePoint On-Boarding Form High Level Overview

When the On-Boarding Form is updated with date information, it will display in the Request details.

SharePoint On-Boarding Script Overview



SharePoint Applications > Onboarding > Script

Script

HRA Dashboard
Hiring Dept Dashboard
Svc Provider Dashboard
All Active Requests
Completed Requests
Script
Reference Library
Recycle Bin

New | Actions | Settings | View: By Activity

Order	Title	Role	System(s) Accessed	Comment
Activity : 1: Creation (2)				
01	Click the "New" button in the Position Selector Web Part	HRA	HR Dashboard	When the 'new' button is clicked, the Onboarding Form will appear for the HRA.
02	Input at least the required columns and click the "OK" button to save	HRA	HR Dashboard	Most data is currently manually input from the CATS System. Input at least the required columns indicated by a red asterisk. Note: Onboarding FAU(s) may need to be obtained from the Department Contact.
Activity : 2: Space (3)				
03	Receive SharePoint alert that the position request has been created. Click the link to the request in the email alert.	Space	Outlook	Alert sent within 5 minutes
04	Edit the request and input dept contact date and space requirements into the appropriate columns and click the "OK" button	Space	Svc Provider Dashboard	Space contacts Dept rep separately to obtain space requirements.
05	Edit the request and input space number and Space Ready Dt	Space	Svc Provider Dashboard	This may be combined with previous step if no work is required for the space. Space Ready Dt should be input as soon as the space is ready.
Activity : 3: Hiree/Onboarding - HR (5)				
06	Edit the request and input Hiree Information	HRA	HR Dashboard	After hiree has been identified; dates will be entered at different times as information is known/becomes available.
07	Edit the request and input Computer information	HRA	HR Dashboard	Complete Svc Now Request
08	Edit the request and input Office Phone Information	HRA	HR Dashboard	Complete Svc Now Request
09	Edit the request and input Badge information	HRA	HR Dashboard	Complete iRequest
10	Edit the request and input Payroll information related to the appointment	HRA	HR Dashboard	Payroll dates may be entered at different times dependent on when tasks are started/have ended.
Activity : 4: Onboarding - Svc Providers (4)				
11	ITS Computers receives alert and inputs completion dates when ready	ITS Computers	Svc Provider Dashboard; Outlook	Alert sent within 5 minutes of the Computer Svcs Request Date being saved.
12	Edit the request and input the phone information.	ITS Phone	Svc Provider Dashboard	
13	Edit the request and input the badge appointment information.	WMC	Svc Provider Dashboard	
14	Edit the request and input Payroll completion dates	Payroll	Svc Provider Dashboard	
Activity : 5: Cell Phone (2)				
15	Edit the request and input Cell Phone Information	HRA	HR Dashboard	Infrequently used
16	Edit the request and input Cell Phone Completion Dates	ITS Phone	Svc Provider Dashboard	Infrequently used
Activity : 6: Close (1)				
17	Close out the request by updating the Status column to "Complete".	HRA	HR Dashboard	This step removes the request from the Active area of the Dashboards and sends an alert to mailroom.

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SharePoint On-Boarding Script High Level Information:

- The SharePoint On-Boarding Script provides a step by step guide to completing the SharePoint On-Boarding Process.
- The SharePoint On-Boarding Script only contains On-Boarding activities that are tracked in SharePoint. Please note that some On-Boarding activities and processes occur outside of the SharePoint Tool.
- The SharePoint On-Boarding Script:
  - Lists tasks by Activity
  - Displays the system used for the task
  - Displays the role responsible for completing the task
- The SharePoint On-Boarding Script is crisp, concise and syncs with the key tasks and dates that are being tracked in the SharePoint predecessor, the HR On-Boarding Spreadsheet.

The New SharePoint On-Boarding Process is crisp, concise, and